

BID ADDENDUM

January 24, 2008



**State of North Carolina
Department of Health & Human Services
Office of Procurement & Contract Services**



**FAILURE TO RETURN THIS BID ADDENDUM
IN ACCORDANCE WITH INSTRUCTIONS MAY
SUBJECT YOUR BID TO REJECTION**

BID NUMBER: RFP 30-DHHS-1221-08

SERVICE: "NC FAST Case Management Solution"

ADDENDUM NUMBER: 1 - Questions and Answers

PURCHASER: Susan W. Lewis

USING AGENCY: NC DHHS

OPENING/TIME: February 19, 2008 by 5:00 PM

INSTRUCTIONS:

1. Two (2) properly executed copies of this Addendum are to be included with your proposal.
2. This Addendum contains questions from potential offerors and DHHS' responses.
3. Execute Addendum:

Bidder: _____

Authorized Signature: _____ Date: _____

Name and Title (Typed or Printed): _____

Questions and Answers

	Vendor Question	DHHS Response
1.	Can the "Function Response Spreadsheet" and "Technical Response Spreadsheet" be provided in excel format?	Please refer to the published copies of these Excel spreadsheets in the Procurement Library.
2.	Are there any limitations to the bidders on the size of their company?	There are no limitations.
3.	In the RFP on page 125 there are some checklists (G2 and G4) that require responses from the vendors that don't seem to be on the Procurement Library. How should we complete these?	Offerors are to print these checklists from RFP Section VIII.G.2 and G.4, complete them in written form, scan to electronic format, and include them in the proposal. Refer to RFP Section VI.C.5.d.
4.	<p>Reference page 7, the first two bullets, and page 10, the second bullet under Section C.</p> <p>The purpose of this question is to get clarification as to the extent of configuration/customization services that is requested of the vendors with this procurement.</p> <p>Is it the State's intent to achieve knowledge transfer by working side-by-side with the selected vendor, and be a part of the team that configures/customizes the software product selected for the nine (9) program areas, or should we assume that the functional and technical requirements outlined in the RFP (FRS and TRS) will be fully configured and delivered by the selected vendor as part of this procurement?</p>	<p>The vendor may include existing configuration of its base product in its bid. The vendor is required to estimate the cost of any customization indicated in its FRS responses. No new configuration of the base product is included in this award. The State, at its sole discretion, may contract with the selected software vendor to perform individual customizations of the base product.</p> <p>Vendor services to be provided under this RFP by the selected software vendor are listed in RFP Section I.A.</p>
5.	<p>Reference page 16, number 8 regarding demonstrations.</p> <p>The purpose of this question is to better understand the content of the demonstrations for vendors who achieve a certain score in the Tier 1 evaluation, as described in this section.</p> <p>Throughout the RFP the importance of being able to 'configure' as opposed to 'customize' or write code is evident. Since configuration of the vendor's software will allow DHHS to meet the agency's requirements there could be many of the nine (9) program areas that will need to be configured before actually being able to demonstrate the particular system. As such, can the State clarify the content and expectation of the demonstrations that are part of the Tier 2 evaluation?</p>	If requested, the vendor evaluation environment should include existing similarly configured program areas. No new configuration is required as part of the evaluation environment.
6.	Would it be possible to obtain a document in word format of the technical and functional matrices (tables) for your Request for Proposal?	Vendors must use the published copies of these Excel spreadsheets in the Procurement Library.

7.	<p>In order to comply with the requirements stated in the RFP. Would the State consider providing the following in pages in MS Word format.</p> <p>The Execution Page (Page 1 of <i>Cover Page</i>)</p> <p>Attachment B.1. "Certification Regarding Lobbying"</p> <p>Attachment B.2. "Certification Regarding Debarment, Suspension..."</p> <p>Attachment B.3 "Certification Regarding Drug-Free Workplace Requirements.</p>	Please print the Execution Page and three federal certifications, sign and date them, then include them in the proposal.
8.	<p>Can the State clarify the due date for submission of the proposal? Is it February 18th? In the second table on page 18 of the RFP, the deadline for submissions is listed as 02/18/2008. However, on page 2 of the Cover Page of the RFP it is stated that: "Sealed bids, subject to the conditions made a part hereof, will be received at 801 Ruggles Drive, Hoey Building, until 5:00 p.m. on the day of opening". The day of opening is stated as February 19, 2008 on the State's Interactive Purchasing System.</p> <p>Can the State clarify the submission date?</p>	The vendor proposal deadline is February 19, 2008 by 5:00 p.m.
9.	Is it the desire of the State to have 22 copies of the Cost Proposal?	Yes, the vendor must submit 2 signed originals and 20 copies of the Cost Proposal.
10.	<p>On page 48 of the RFP, Section VI, C, 6) a. States, "<i>This subsection of the proposal must contain a MS Word version of the vendors completed FRS workbook.</i>" We request clarification on this item. Does this mean we have to supply an Excel version and a MS Word version on the CD ROM? Would the State consider allowing us to provide the Excel versions as well as PDF format instead of MS Word on the disks? Or would the State provide us with the MS Word versions of the FRS workbooks?</p>	<p>Refer to RFP Section VI.A.3.e. for the number of discs and their contents that the vendor must provide.</p> <p>The vendor must provide an Excel version of the completed FRS, and should include a PDF version rather than a Word version.</p>
11.	<p>On page 45 section c, second paragraph...."<i>The vendor must provide at least 2 references</i>". We request a clarification on the requirement. Is State asking the vendor provide 2 references with contact names in addition to all our contracts in the last 60 months or does this mean we have to provide to points of contact for each contract over the last 60 months?</p>	The vendor must provide at least one reference for each contract over the last 60 months. At a minimum, there must be at least 2 contracts with references.
12.	The RFP states that the proposed solution cannot be more than 20% customized to meet the defined requirements. How is the 20% figure measured, is this 20% of total line items or 20% of the cost of the application? (Page 10 Item 4)	Refer to RFP Section III.B.21.

13.	The RFP states that the Vendor must utilize a project management methodology based on the PMI's PMBOK. If another Project management methodology is used but has been shown to map to the State process in previous projects will this be considered as meeting the requirement. (Page 23 Item 13B)	No. The State requires the Vendor to follow a project management methodology based on the PMI PMBOK.
14.	Reference page 1: The purpose of this question is to request an extension of the due date for proposal submittals. With questions submitted through January 17, and the State requiring time to formulate responses to the questions, the answers may not be available for some time. Answers may have significant impact on the vendors' proposals and appropriate time would be required to adjust responses. An extension of one month is being requested.	Due to the NC FAST project timelines, funding, and the ability to move forward with other NC FAST projects, the proposal submission deadline will not be extended.
15.	We found a problem with the one of the FRS spreadsheet. In the section 09-WF, we cannot update column 2 (Customization) after line 51 and Requirements 03.006.001 and 03.006.002 (lines 907 and 908 respectively) we cannot enter responses in any columns. Can the State correct this and post another FRS spreadsheet?	The problem was corrected on 01/21/2008.
16.	In Section VI of the RFP " <i>Proposal Content & Organization</i> ". In part C. of this section (<i>Proposal Contents</i>), it provides guidance on how to complete the various response items. However, in C. 4 a. on page 46, the RFP states that, " <i>An example of a DHHS Scope Statement is available in the NC FAST Information Library</i> ". We have not been able to locate this document within the Information Library. Can the State provide a sample the Scope Statement document?	A link to the template for the DHHS Scope Statement was added to the Information Library on 01/21/2008.
17.	When does the Department anticipate releasing the services RFP for the first program integration into the case management system?	Not applicable to this RFP.
18.	Has funding been secured for the vendor services to integrate any of the human service programs into the case management system? If so, how much and for which programs?	Funding is identified for the Automated Interview Software Selection procurement. Integration services are not part of this RFP. Integration services will be handled as a separate procurement.
19.	Has the Department determined the order of program integration (e.g. food stamps, child welfare) into the case management system? If so, which benefit/service program will be integrated first and in what sequence will other programs follow?	Not applicable to this RFP.

20.	Experience requirements are listed in both the RFP and the information library. Must vendors meet experience requirements in both documents or does the RFP take precedence? For example, "COTS Vendor/Product has at least one implementation in another state addressing the Food Stamps and LIEAP programs" is an example in the Information Library, but not in the RFP	If a conflict exists, the RFP and Addendum documents will take precedence over any documentation in the Procurement Library and Information Library.
21.	If new tables/objects, screens and data mapping for integrations need to be added to be certain functionality in the FRS matrix, are those considered configurable or a customization?	Refer to RFP Section VIII.A for definitions of Configurable/Configuration and Customization.
22.	Are conversions required from the list of legacy systems and if transformations are required to enable them is that considered configurable or a customization?	Data conversion and migration are not applicable to this RFP. However, refer to RFP Section 1.A regarding conversion tools and conversion tool training.
23.	The RFP specifies what features the eligibility engine must have in common services. But the specific North Carolina eligibility rules and supporting documents (i.e., Service eligibility decision notice) that are referenced in the eligibility sections of the RFP are not provided for each of the nine case management scenarios that are required. Please add to the information library the North Carolina specific eligibility rules and required supporting documents for the nine case management scenarios to allow the offeror to provide an accurate proposal response.	Links to the DHHS Policy Manuals and Forms were added to the Information Library on 01/21/2008. Manuals: http://info.dhhs.state.nc.us/olm/manuals/ Forms: http://info.dhhs.state.nc.us/olm/forms/
24.	Are interfaces to State systems considered a customization to be included within the 20% requirement?	Refer to RFP Section III.B.11 for BSF response categories in the FRS. All proposed customization must be included in the 20% requirement.
25.	We would like to officially request that the due date for the response be extended. We are very interested in providing a response to the State of North Carolina for this opportunity. Due to the broad scope and detailed response required to meet the State's needs, we request that it be extended a minimum of 4 weeks from the current date of 2/19, and ideally 6 if possible. An extension would be in the best interests of NC DHHS and the citizens of North Carolina as it would ensure that all viable vendors are able to offer a response. We also respectfully ask that notification of an extension be communicated as quickly as possible so that all vendors can plan accordingly.	Due to the NC FAST project timelines, funding, and the ability to move forward with other NC FAST projects, the proposal submission deadline will not be extended.

26.	Given the complexity of the NCFast Request for Proposal would the State consider extending the Day of Opening of all vendor's responses to 03/19/2008?	Due to the NC FAST project timelines, funding, and the ability to move forward with other NC FAST projects, the proposal submission deadline will not be extended.
27.	We are unsure whether the RFP includes the Systems Integration work for NCFast or if the RFP is for the acquisition and installation of the software only. Does the State intend to issue a separate RFP for implementation, NCFast rollout and end user training.	Refer to RFP Section I.A, Section I.C, and Section III.B.19.
28.	Which HHS programs (Child Welfare, Medicaid, Eligibility ...) will be in the first rollout of NCFast?	Not applicable to this RFP.
29.	Is there a preferred technical platform for NC FAST? For example, which Operating System (Mainframe, Linux, Microsoft, etc.). If so, can you provide additional details about that platform?	Refer to RFP Section III.B.6, Section III.B.7, Section VIII.G.2, and Section VIII.G.3.
30.	Will the State consider solutions that are not hosted on State facilities?	No.
31.	Is there a timeframe for installing and implementing the software?	The vendor must propose a Project Work Plan. Refer to RFP Section III.C.2 and Section VIII.D.2.
32.	Item 13.01.14 of the Technical Response Spreadsheet (TRS) mentions role based authorization security. Should it be necessary to use a third party product to implement this requirement when does the State anticipate procuring the software?	The vendor must provide in the Project Work Plan a timeframe for procuring any proposed software. Refer to RFP Section IV.B to include the cost of any proposed software.
33.	If there are multiple vendors providing a single solution how would the State like to see the final proposal. Should each vendor provide their own document or would the State like a single combined response	The State requires one proposal from a prime software vendor. Applicable subcontractors or partners of the prime software vendor must be included in the proposal.
34.	Has the State of NC identified a target timeframe for initiation of the implementation process?	Contracted items in RFP Section I.A, Section I.C, and Section III.B.19 will begin to be implemented upon award.
35.	<p>The RFP mentioned it was anticipated that the software would be implemented in phases. Related to that:</p> <ul style="list-style-type: none"> • Have specific programs been identified as high priority for early implementation? • What is the anticipated timeframe by the State of NC for full implementation of the software for all programs? 	Not applicable to this RFP.

36.	Does the State of NC provide medical management for individuals in their Medicaid programs? (Medical Home, medical case management, disease management services for specific chronic conditions, etc.) If so, are the programs administered internally or through a third-party vendor and would information from these programs need to be integrated into the proposed software solution?	Vendors must respond only to functionality described in the FRS.
37.	The RFP has a requirement for the software to “provide method to query narrative documentation”. Additional clarification on the types of query filters desired would be helpful in answering this requirement.	Vendors must respond only to functionality described in the FRS.
38.	In the <i>FRS Sheet: Global Functions</i> section “01.07 Providers” discusses the need for the software to provide information on providers to the caseworkers. Is it anticipated the provider information loaded into the software solution will be from a currently existing State provider database?	Not applicable to this RFP.
39.	Can the State break down the 14,000 users into broad categories and numbers within each category to enable estimation of the number of business process workflows anticipated for each group?	Not applicable to this RFP.
40.	Are there additional County systems that will require integration beyond the 20 legacy systems identified.	Not applicable to this RFP.
41.	Do the NCID Security authentication services incorporate single sign-on capabilities? If so, will one solution manage all 14,000 users?	Yes to both questions.
42.	Does the solution need to support field-based users working within remote facilities or family environments?	The vendor must identify all the capabilities of its software offering.
43.	Could you clarify that this RFP is solely for solicitation from Vendors to provide the Software solution and optional technical services to the State for NC FAST.	Refer to RFP Section I.A, Section I.C, and Section III.B.19 for what the vendor is expected to provide.
44.	Has the State given thought to releasing a separate RFP for Training and Help Desk for NC FAST? (Separate from the SI RFP for NC FAST)	Not applicable to this RFP.

<p>45.</p>	<p>Attachment D.2 NC FAST Case Management Vendor Proposal Subsection Content and Acceptance Criteria:</p> <ul style="list-style-type: none"> - 4.7 System and Technical User Documentation Strategy - 4.8 Installation and Test Strategy - 4.9 Training Strategy - 4.10 Technical Support Strategy - 4.11 Maintenance and Help Desk Strategy <p>In the RFP these subsections require information, strategy and methodology that affect the state personnel to be trained, as well as the 14,000+ state end users (once the selected software is implemented). Would the State consider allowing the Software Vendors responding to this RFP to partner with a Training/Help Desk Vendor to be the Training/Help Desk Vendor from beginning to end of the project? (not have it be part of the SI RFP) This would ensure continuity for the State staff and end users.</p>	<p>Refer to RFP Section I.C.5.</p>
<p>46.</p>	<p>When does the State anticipate release the SI RFP for NC FAST?</p>	<p>Not applicable to this RFP.</p>
<p>47.</p>	<p>The RFP requires the COTS vendor to denote the percentage of code or object customizations required to meet the business system functions and technical requirements. The RFP also limits these customizations to 20% of the overall requirements. How does the State plan to validate the vendor's response to meeting the requirements and that 80% of the requirements are met with the application without customization?</p>	<p>Refer to RFP Section III.B.8, "As part of its proposal submission, the Vendor must provide written confirmation that it will comply with the twenty percent (20%) customization threshold requirement as stated in RFP <i>Section I.C.4</i> and defined in detail in RFP <i>Section III.B.21—Customization</i>. Failure to confirm compliance with this requirement shall result in rejection of the Vendor's entire proposal by the State pursuant to 09 NCAC 06B.0401."</p> <p>The State reserves the right at any point subsequent to award to determine that functionality indicated by the selected vendor as being satisfied by means other than customization does in actuality require customization. Any future customization arising under these circumstances shall be performed by the vendor at no cost to the State.</p>
<p>48.</p>	<p>Will the COTS vendor or future Systems Integration (SI) vendor be responsible for the COTS configuration and enhancements/customizations? If the answer is that the responsibility will fall to the chosen SI, how will configuration/customization differences be resolved between the COTS vendor and the SI vendor?</p>	<p>The vendor may include existing configuration of its base product in its bid. It is required to estimate the cost of any customization indicated in its FRS responses. No new configuration of the base product is included in this award. The State, at its sole discretion, may contract with the selected software vendor to perform individual customizations of the base product. The State will resolve any vendor conflicts.</p>

49.	Please clarify how the responsibilities for services will be divided between the State, the COTS vendor and the future SI vendor?	Refer to RFP Section I.A, Section I.C, and Section III.B.19. Integration services are not part of this RFP.
50.	Has consideration been given to the implementation approach/sequence and timeline? Is this segmented by DHHS Divisions, geography or some other combination?	Not applicable to this RFP.
51.	It appears the State intends to release two separate procurements to satisfy all development and implementation requirements of NC FAST. If so, if a firm was awarded the training contract for the current procurement opportunity would there be restrictions prohibiting the same firm from being awarded the training for the second NC FAST procurement?	Refer to RFP Section I.C.5.
52.	Could you provide a list of all the vendors who have submitted questions?	<ul style="list-style-type: none"> • Accenture Public Service • CA Global Public Sector • CaseNet, Inc. • Child Support Innovations • Column Technologies, Inc. • Curam software • Daily Journal Corporation/SustainTechnologies • Deloitte • HCL America, Inc. • Lagan • MetaLogix • Oracle • RCM Technologies, Inc. • SAP Public Services, Inc.
53.	<p>The RFP says that we need to get the TRS spreadsheet the website - "The Procurement Library includes the TRS, the completion of which is also required of the Vendor; and the North Carolina Statewide Technical Architecture (NCSTA) guidelines."</p> <p>When I download this, it has a macro that won't let me input into some of the fields. Can we get someone to help us maybe we are doing something wrong.</p>	Cell validation was determined to be incorrect in the Technical Response Spreadsheet. The problem was corrected on 01/07/2008.